

◆ OPEN-SOURCE AI PLAYBOOK · FOR EVERY TEAM

Instant Customer Answers

Customers wait hours for answers your team has given a hundred times, and your best people spend the day repeating themselves.

THE SYSTEM

Drafts an accurate reply to every incoming question from your own docs and past answers, so the team only handles the new and the tricky.

🕒 BUILD TIME

1-2 weeks

🛠️ HOW IT'S BUILT

Low-code

🔌 WORKS WITH

Zendesk or Intercom
or Google Workspace
or Microsoft 365

👤 OWNER

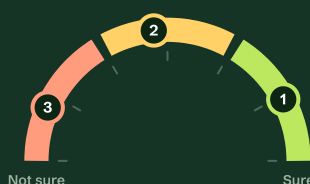
Head of support or
customer success

How it works: every question gets a score, and the score picks the lane

1 Questions come in

- 1 How do I change the reminder text my clients get?
- 2 Can I switch to annual billing mid-month?
- 3 Our Outlook sync stopped after yesterday's update.

2 How sure is it?



What it checks

- ◆ Is the answer in an approved doc?
- ◆ Has the team answered this before?
- ◆ Is the topic on the approved list?
- ◆ Any risk signs: a refund, a legal word, an upset customer?

3 Each question lands in a lane

NOT SURE, OR NEW

👤 Goes to a specialist

No draft, no guessing. The specialist gets a short summary, the customer's plan and recent tickets, and a note that no matching doc was found.

👤 The specialist answers. The answer can become the next help article.

PARTLY SURE

📄 Draft with a flag

A draft is ready, with one line flagged: the proration rule came from a doc last updated in 2024.

👤 The agent checks the flagged line, fixes it if needed, then sends.

SURE

✓ Ready draft

A complete draft, built from the help article and three past replies, with every source linked.

👤 The agent reads it and presses send, or edits it first.

🛡️ **Always a person, whatever the score:** refunds, credits, legal questions and upset customers. Every reply is checked by an agent before it goes out.

What the agent sees: a ready draft, with its sources showing

Ticket #4812 · Ana Ruiz, Ruiz Physio · Pro plan

Changing the reminder text

Hi, our reminder texts still say “see you at the clinic”, but we’ve moved half our sessions online. Can I change what the reminder says, and can it be different for online sessions?

- 1 **Help center: “Edit your reminder messages”**
· Updated 12 Sep
- 2 **Past reply to a similar question, ticket #3920**
· Sent by Sam, rated helpful
- 3 **Account: Ruiz Physio, Pro plan** · Read-only

✧ Suggested reply

Sure · internal note, not sent

Hi Ana, yes to both.

Go to Settings → Reminders and press Edit next to the message you want to change. 1

To send a different reminder for online sessions, add a second template and set its type to “Online”. Bookings marked online will use it from then on. 1

Custom templates are included in the Pro plan, so there’s nothing to upgrade. 3

If it helps, we can copy your current text into the new template for you. Just reply here. 2

Send The agent reads it, edits if needed, and sends.

Sample ticket and reply, fictional company.

Can we build it? **FOR YOUR TECH LEAD**

🛠 Tools you’ll use

Where questions arrive	Zendesk or Intercom	or Freshdesk, Help Scout, a shared inbox
Finding the answer	A search index of help articles and past replies	or the Company Brain, pgvector
Drafting and scoring	Claude (API)	or ChatGPT, Gemini
Running the steps	n8n	or Make, Zapier, a small script
Showing the draft	An internal note on the ticket, tagged by lane	or a sidebar app in the helpdesk
If you’d rather buy	Intercom Fin or Zendesk AI	or Freshdesk Freddy AI

🛠 Three ways to build it

Start simple 1-2 days

Load your help center and your 50 most common replies into a Claude or ChatGPT project. Agents paste a question in and copy the draft out.

Production 1-2 weeks

n8n runs on every new ticket: search your docs and past replies, draft, score, tag the lane and post the draft as an internal note.

Custom 3-5 weeks

Scoring tuned on your own past tickets, a weekly list of questions with no good source, and auto-send for an approved list if the team wants it.

🔒 Access it needs

- ◆ Read access to tickets, past replies and the help center
- ◆ Permission to add internal notes and tags, not to send
- ◆ Read-only account details for the customer who wrote in
- ◆ A model account that keeps your data out of training

🛡 Guardrails

- ◆ An agent checks every reply; auto-send only for an approved list, if the team turns it on
- ◆ Answers only from your docs and past replies, with sources shown
- ◆ Refunds, credits, legal questions and upset customers go to a person
- ◆ When nothing matches, it says so instead of guessing

🎯 What to measure

- ◆ Time to first reply
- ◆ Share of drafts sent with no or light edits, by lane
- ◆ Reopened tickets and customer ratings on drafted replies
- ◆ Questions with no good source, and how fast they get a help article

👤 Who builds and runs it

A support lead who knows the common questions owns it, with an engineer or a technical ops person for the first one to two weeks. After that, the support lead reviews the flagged and specialist lanes each week and keeps the approved sources current.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

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We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AiXGrowth

Free 30-minute call · No commitment

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